Oracle Collaboration Suite (OCS) allows you to set up workflows or chains of approval that a document or file must go through before it can be posted to your Workspace. This document outlines how to utilize the workflow function through OCS Content Services.

How Do I Enable Workflow?

Workflow must be enabled for a Workspace through Content Services. You may access Content Services two different ways – through the **Content Services** portlet on the *Team Resources* page or from an existing Workspace. Directions for each are as follows.

Accessing Content Services from the Content Services portlet:
From the From the *Team Resources* page, you can access Content Services through the **Content Services** portlet. To do this:
1. Click on the Content Services portlet header (see Figure 1). The *Content Services* screen will be displayed.
2. Click on the workspace for which you would like to enable workflow and follow the steps outlined in the section below entitled "Enabling Workflow."

Accessing Content Services from an Existing Workspace:
You may also access Content Services from an existing Workspace. To do this:
1. From the Team Resources page, select the "Enter Collaboration Workspace" link in the **Collaborative Workspace** portlet (see Figure 1). The *My Workspaces* screen will be displayed showing the Workspaces to which you have access.
2. Click on the desired Workspace. The Workspace page will be displayed.
3. Click on the "Library" link on the Workspace's left navigation bar. The *Library* view will be displayed. Click on the "Content Services" button. The *Content Services* screen will be displayed. Follow the steps outlined in the section below entitled "Enabling Workflow."
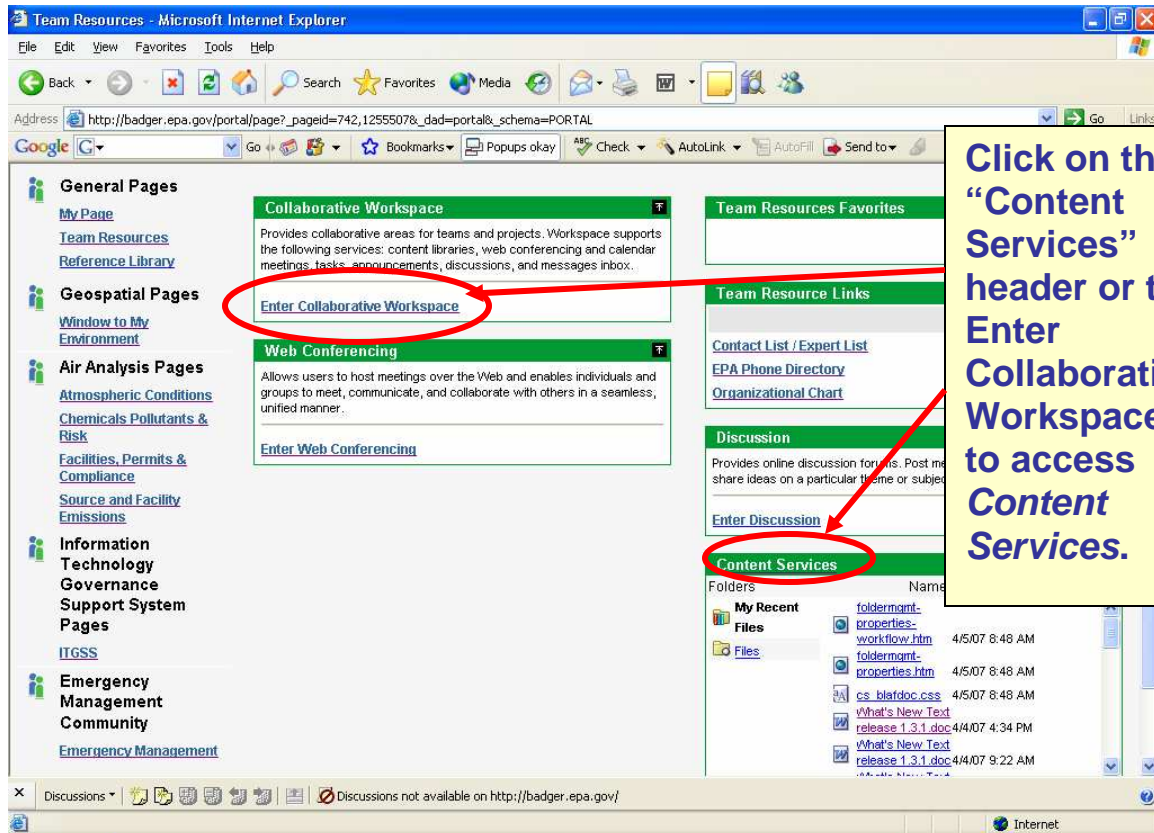
Figure 1 Accessing Content Services from the Team Resources page

Enabling Workflow
To enable workflow via Content Services, follow the steps outlined below.

1. Right click on the Workspace in which you would like to employ workflow and select "Properties.". A pop-up screen will be displayed; select the "Workflow" tab on that screen, as shown in Figure 2.

Figure 2: Enabling Workflow

2. Select the "Modify Workflow Settings" button. The workflow name drop down menu will allow you to select the capability that best suits your Workspace. You may select:
   a. Serial Approval: Responders approve or deny the request to post a document according to the sequential order you define for each approval; In other words, Approver 2 may only approve the document if Approver 1 has finished approving it.
   b. Parallel Vote: All responders vote at the same time whether to approve or deny a request to post a document to the Library.
3. Select the box to skip the workflow approval process when documents are submitted by the approver, if appropriate.

Figure 3: Workflow Setting Options

How Do I Add Approvers?

To add an approver to the workflow, click the "Add" button on the right hand side of the screen, as seen in Figure 2 and follow the steps below.

1. Enter the name of the individual you would like to be an approver on the new screen.
2. Click the "Search" button to get the list of possible matches, as seen in Figure 4.
3. Click the "Select" button to add that person as an approver.
4. To remove a user as an approver, select the "Remove" button.
5. To add another approver, please repeat steps 1-3. Note: If you have selected "Serial Approval" the order in which you add approvers is the order in which the approvals will need to take place.

Figure 4: Add Reviewer

How Do I Submit a Document for Approval?

When Workflow has been enabled on a Workspace, each time a document is uploaded to the Library, it will automatically be submitted for approval before it may be made available to other Workspace members. A message will be displayed on the Library screen alerting the user that their "file has been submitted for approval" as shown in Figure 5 below. For more information on uploading files, please see the **Workspace Library** help topic.

Figure 5 Submitting Files for Approval

How Do I Approve Files Submitted for My Review?

Approvers may review and approve files that have been submitted to them through the Content Services screen. Instructions for accessing Content Services are provided in the sections above. To view submitted documents for approval:
1. Click on the Reports icon on the left side of the Content Services screen as shown in Figure 6 and then select the "My Requests" link. The requests pending your approval will be displayed.
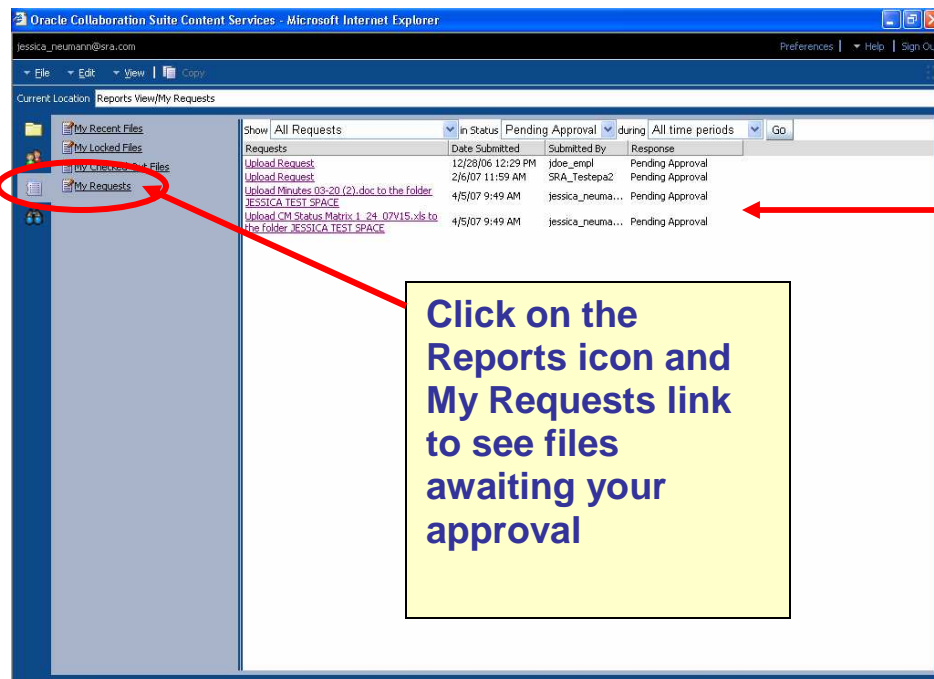

Figure 6 Approving Requests

2. To provide your approval or rejection, simply click on the request. The *Workflow Request Information* screen will be displayed as shown in Figure 7.

Figure 7 Approving Files

3. To approve the request, click the "Approve" button. To reject the request, click "Reject." When all approvers have approved the request, the file will be posted to the Library for other Workspace members to access.

Please Note: *Approvers are not notified by OCS when files are awaiting their approval. They must check Content Services to ensure they are aware of requests pending approval.*